

American Bank



WEALTH
MANAGEMENT



EXPERT GUIDANCE TO ACHIEVE YOUR FINANCIAL GOALS.

You've worked hard to build financial security. But it can be daunting to successfully oversee your personal finances, while remaining on top of your professional responsibilities. After all, managing wealth has become increasingly complex. At the rate the economic and tax landscapes are evolving, making significant financial decisions magnifies the need for quality advice and well-timed action.

There's no need to feel overwhelmed and frustrated by missed opportunities. Wealth management doesn't have to be a chore. You deserve a financial partner who will thoughtfully listen and understand your aspirations.

Our dedicated team of wealth management advisors take the guesswork out of complicated financial decisions. We start by developing a personalized investment strategy aligned to your unique priorities and future goals. We get on the same page with you.





WEALTH STRATEGIES TAILORED TO YOUR OBJECTIVES

To manage your wealth, we deploy a comprehensive spectrum of services to leverage both the asset and liability sides of your balance sheet. This means you'll benefit from core banking and custom credit strategies as well as investment, trust, and planning solutions. This approach is designed to help you through each stage of wealth accumulation, asset protection and asset distribution.

FINANCIAL PLANNING

Everything begins when we work together to develop your unique financial roadmap. Our experienced advisors' partner with you to identify personalized solutions to secure your financial vision. Once in place, your plan is continuously monitored using industry-leading technology and then bolstered by regular one-to-one touchpoints.

- Retirement roadmap
- Business expansion and succession
- Continual plan monitoring and analysis

TRUST & FIDUCIARY SERVICES

Realizing your vision and legacy plan requires the expertise and sensitivity of an experienced team. Our professionals have partnered with generations of families and are committed to managing your Trust and Estate with exceptional service and expert advice. Should your wealth strategy include unique assets, engage our Specialty Asset team for turnkey solutions benefiting present and future generations.

- Comprehensive Trustee Services
- Family Office Solutions
- Estate Administration
- Specialty Asset Management
- Mineral Interests
- Real Estate
- Farm and Ranch



INVESTMENT MANAGEMENT

Building and protecting your wealth legacy demands the approach be adapted to your goals, time horizon and tolerance for risk. Our experienced investment managers apply extensive research and analysis to develop strategies for your personal or corporate investment account, trust or charitable entity.

- Fiduciary standard of care
- Custom, tax-efficient portfolio solutions
- Investment Policy Statement development with continuous monitoring and regular reviews

PRIVATE BANKING

Enhancing your financial well-being requires the right strategy balanced with the right mix of products. Our suite of banking services offers tailored credit and liquidity options for managing your wealth while growing your business. You'll also have a dedicated partner to guide all aspects of your financial strategy.

- Core banking
- Custom credit strategies
- Guarantor-based lending
- Investment secured lines
- Mortgage lending
- Practice buy-in loans
- Life insurance premium finance

YOUR SUCCESS IS OUR GOAL

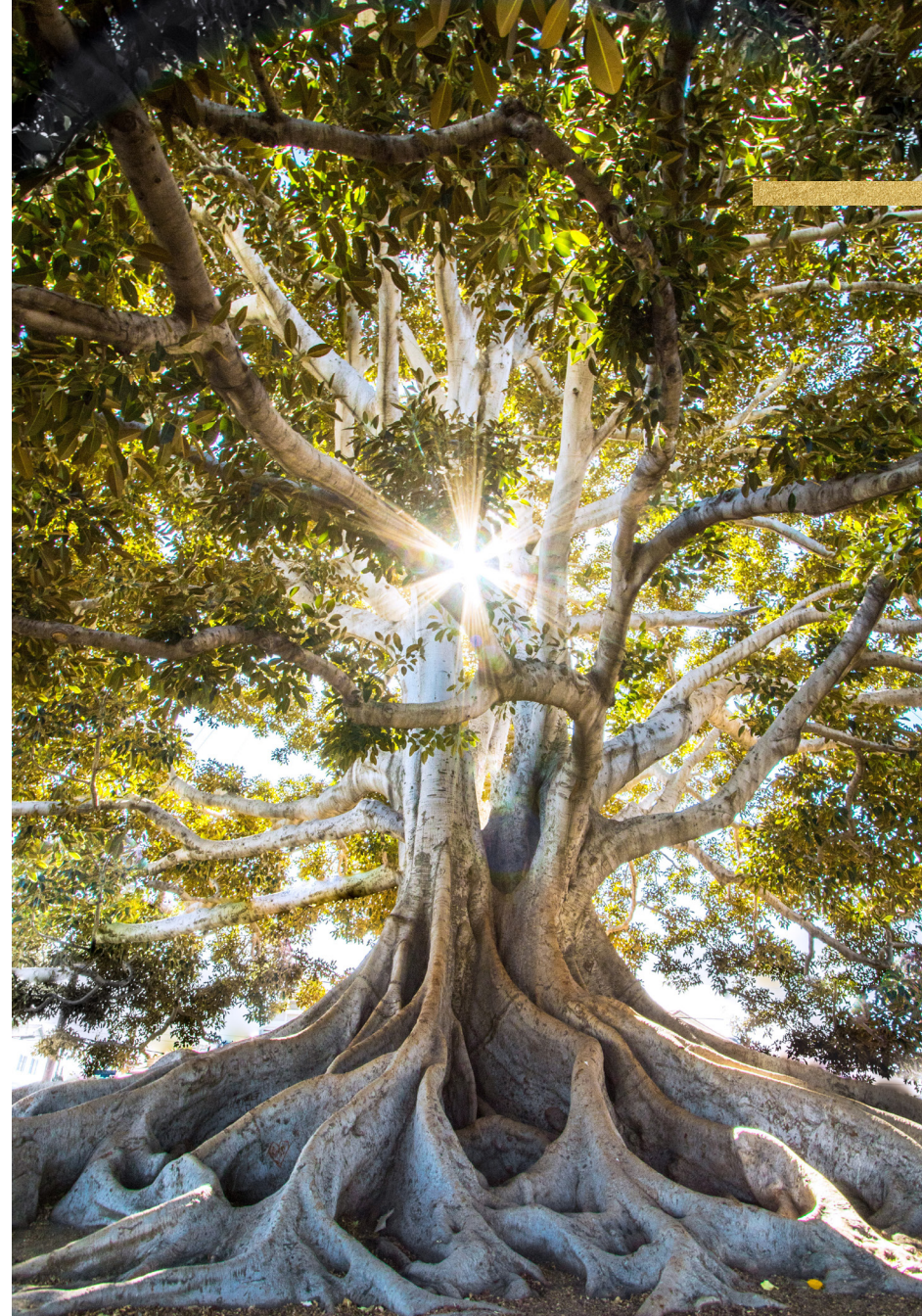
Whether you're in the accumulation phase of wealth building, nearing retirement, or planning your legacy, we can help you achieve your financial goals.

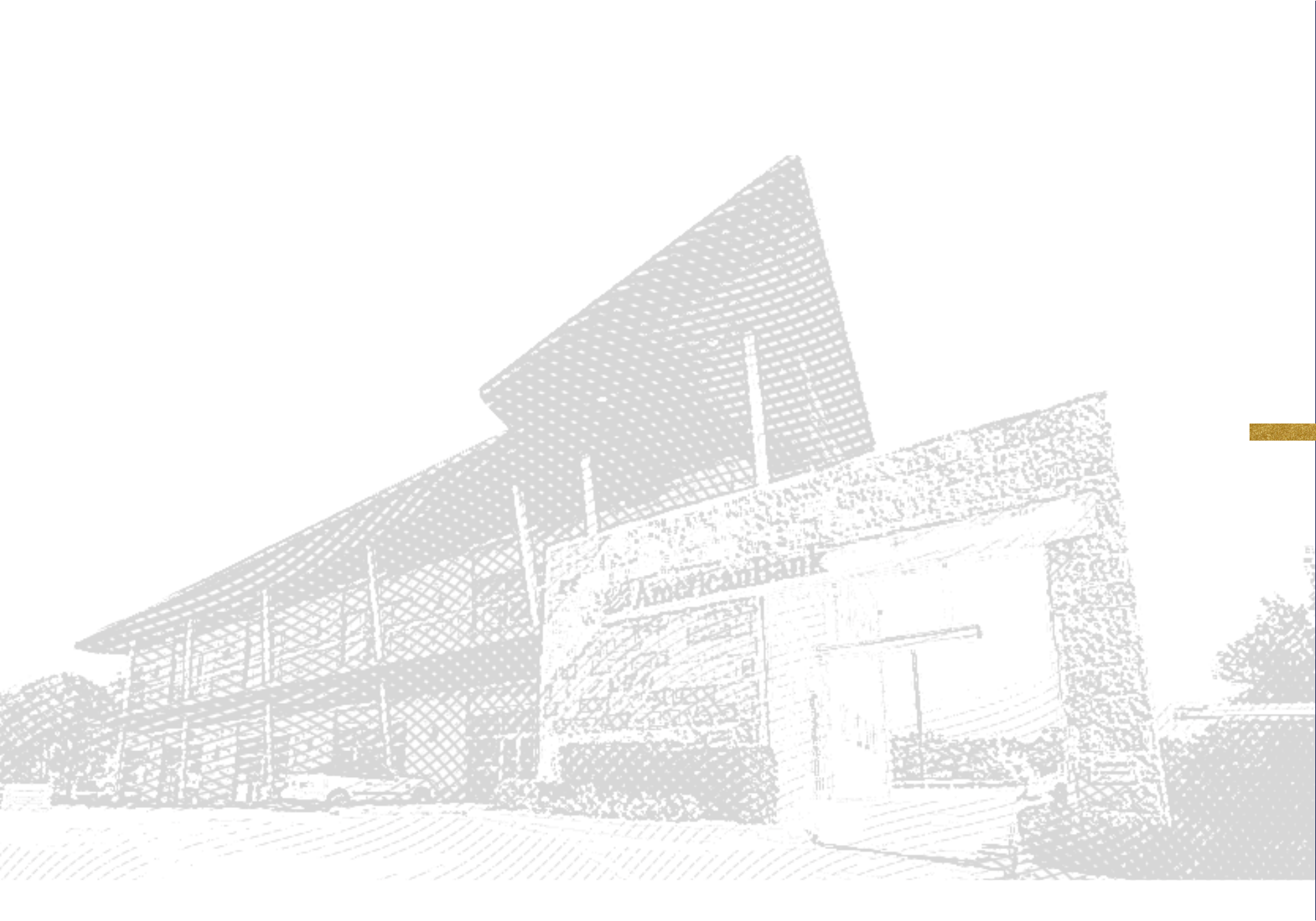
Your first step is to meet with one of our wealth management advisors. Stop worrying about missed opportunities and instead start improving your plan.

We are here to serve you.

CONTACT US

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OUR MISSION

Our mission is to delight our clients and their families by providing a proactive, customized and integrated approach to wealth management:

- By serving as a personal advocate to our clients,
- By offering a professional, family office environment,
- By aligning resources to provide financial and estate planning, asset servicing and management, trust and fiduciary services, and private banking.

ABOUT AMERICAN BANK

Founded in 1970, American Bank remains committed to Texas families and Texas banking. With offices throughout the Coastal Bend area, Austin, Houston and San Antonio, we have multiple locations to serve you. We offer integrated wealth management solutions that are truly customized to meet your evolving needs. Allow us to bring clarity and confidence to your financial well-being. We'd be honored to have the opportunity to serve you.



